September 21, 2020
ADDENDUM NO. 2
REQUEST FOR PROPOSALS (RFP) #MWJ2020-06
CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) SYSTEM

<u>**ONE (1) ORIGINAL SIGNATURE HARD COPY AND TWO (2) USBs OF THE PROPOSAL TO BE SUBMITTED TO:**</u>
City Colleges of Chicago
Dawson Technical Institute
Procurement Services
3901 S. State Street, Room 102
Chicago, IL 60609
Attn: Marietta Williams-Johnson, Buyer

All proposals are due Wednesday, September 30, 2020, no later than 12:00 p.m. local Chicago CDT.
Proposals can be delivered/dropped-off at the rear of the building, at the parking lot building entrance.

Part I – Answers to questions

Q1.   Approximately how many full time and part time users total will need access to the CRM/How many advisors would need access to the CRM?

A.   CCC prefers an enterprise or tiered license model rather than named licenses. The attached Job Titles and Employee Count total spreadsheet provides additional information. For instance, there are 100 employees with the Advisor job title across the district. There may also be 100 clerical staff within an advising office who need access. See the Issues by Department attachment to get a sense of how many departments may be interacting with the CRM. Advisors and clerical / front desk staff would need a lower level of access than an administrative user.

Q2.   Will faculty need access to the CRM, if so approximately how many?

A.   On the whole, faculty will not need access to the CRM, with the exception of Department Chairs, who may need to follow up on Academic Appeals, complaints, etc. There are roughly 70-80 academic departments across campus.

Q3.   How many users will be involved with the Alumni and donor outreach portion of the CRM solution?

A.   A team of 5 centrally manages the current alumni and donor outreach, but this may need to grow over time.

Q4.   Will other donor management tools like gift processing, giving pages and gift entry management be considered in the scope of this RFP?

A.   Bloomerang, GIVE BUTTER are tools currently being brought on by the CCC Foundation team

Q5.   Is the City Colleges looking for the CRM to be the primary technology supporting advising and student success functions of the City Colleges? If so could you provide more details on any requirements of advising functions the City Colleges is looking for beyond appointments and calendars?

A.   At present, we are not thinking that the CRM would be the primary tool supporting advising and student success. However, we have the EAB/Navigate contract through the end of Spring term 2022, and plan an RFP starting February 2022. We would be interested in hearing from a potential vendor about how it would look to use the CRM for appointment scheduling, caseload management, and reporting. For more information on Navigate please consult the EAB website.

Q6.   With respect to Question B 3 regarding Joint Ventures on page 5 of the RFP, Our solution is built on the Salesforce platform, which requires contracting with Salesforce for the platform licenses and with TargetX for the product subscription. If our response is the selected one, are you allowed to award both contracts? If not, both TargetX and Salesforce can work with a purchasing agency, Carahsoft. Will you be able to award a single contract through a purchasing agency such as Carahsoft?

A.   In accordance with the joint ventures provision, CCC may award a single contract to the prime proposer, including any primary proposer who identifies subcontractor that will perform a portion of the services, or a single contract to a legally established joint venture.

If a prime proposer is proposing a joint solution that requires CCC to execute a contract with a third party and/or pay a third party directly, the proposal must clearly indicate why it is necessary for CCC to directly contract and/or pay the third party. The proposal must include the capability/scope/ and pricing for each third party as well as the third party's proposed contractual documents. Additionally, each third party must meet the requirements set forth in the RFP and submit all required documents, including but not limited to the Executive Summary Form, Letter of Intent, Reference Questionnaire and the documents in the Appendices. CCC reserves the right to reject any third party and accept only the prime proposer.

Q7.   It is possible to award two contracts as long as there is clarity on the terms and conditions of each contract?

A.   In accordance with the joint ventures provision, CCC may award a single contract to the prime proposer, including any primary proposer who identifies subcontractor that will perform a portion of the services, or a single contract to a legally established joint venture.

If a prime proposer is proposing a joint solution that requires CCC to execute a contract with a third party and/or pay a third party directly, the proposal must clearly indicate why it is necessary for CCC to directly contract and/or pay the third party. The proposal must include the capability/scope/ and pricing for each third party as well as the third party's proposed contractual documents.

Additionally, each third party must meet the requirements set forth in the RFP and submit all required documents, including but not limited to the Executive Summary Form, Letter of Intent, Reference Questionnaire and the documents in the Appendices. CCC reserves the right to reject any third party and accept only the prime proposer.

Q8.   Would CCC consider extending the proposal due date by 2 weeks?
   A: In accordance with Addendum No. 1 issued on September 15, 2020, we have extended the due date to September 30, 2020, by 12:00 p.m. Proposals can be delivered/dropped-off at the rear of the building, at the parking lot building entrance.

Q9.   How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution? A. 25 - 50

Q10.   How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution? A. 500-1500

Q11.   How many chat users do you anticipate will access the solution? A. 50

Q12.   How many student applications do you receive annually?
   A. Credit 60-70 K
       Adult Ed 40K (fall semester only)

Q13.   We understand that CCC has an W/MBE requirement. Our solution is proprietary and there are no outside contractors, W/MBE or otherwise, in which we contract with. Thus, a Good Faith Effort cannot be fully realized by us as there are no outside contractors that can be substituted to fulfill a potential contract. Considering that we do not use outside contractors, how would CCC prefer we handle this requirement?
   A. The participation goals as referenced in Appendix 1 can be met with Direct and Indirect Participation as outlined in Section 6. Please attend to 5.1 B which defines how a vendor can submit expenditures with MBE/WBE firms in other business operations. Further, Section 8.1 outlines the submittal requirements for waiver consideration of MBE and/or WBE goals.

Q14.   Would CCC accept digital signatures (e-signatures) in lieu of physical signatures? Do the Economic Disclosure Statement have to be notarized?
   A. Please provide original wet signature submissions.

Q15.   Item number 19.6 on page 12 of the RFP does not contain any text. Was this item meant to be left blank? Or, is there a requirement that was meant to be provided?
   A. Ignore 19.6; it was inadvertent.

Q16.   Do you have an integration platform that you are currently using? No

Q17. Can proposals be hand delivered?
   A. Yes. Proposals can be delivered/dropped-off at the rear of the building, at the parking lot building entrance.

Q18. How many application types does CCC have?
   A. Credit Student
      1. Degree Seeking
                  i. Full time
                  ii. Part time
            b. Non-Degree Seeking
                  i. Early College
                  ii. Visiting Student
            c. International
            d. Selective Enrollment Programs
      2. Continuing Education*
            a. Note: CCC is procuring a new registration system for CE registrations
      3. Adult Education

Q19. On average, how many applications does CCC receive per month? Per year?
A. Last year CCC received between 60-70 thousand credit applications.
    For fall 2020, CCC received approximately 40,000 Adult Ed application

Q20. In regards to CCC's need for event management, how many events does CCC host per year? What type of events are hosted? Are you looking for the ability to have the student register for events on their own?
   A. CCC hosts a large volume of events, for students, outside partners, etc; anything that is prospect or retention focused, we would want to integrate w/ CRM. Ideally, student registration would be included.

Q21. What phone system is CCC currently using for their Call Center?
A. MITEL Contact Center Client / Oaisys Call Recording Management Studio

Q22. What communication channels is CCC looking to utilize to communicate with their prospective students? A. Chat, Text, Email, Call Center

Q23. What social media platforms are currently in use at CCC? Will any platforms be added on in the near future? A. Facebook, Twitter, LinkedIn, Snapchat, YouTube, Instagram

Q24. In question 9.5, the document mentions queues. Is CCC looking to utilize this new system to manage their call center as well?
A. Yes, as we are planning on migrating off our current system to the new solution.

Q25.   In question 9.6, you mention the use region assignment. How does CCC currently determine region assignments? Is it as simple as zip codes or is it robust boarders that CCC has laid out?

A.   (We believe that it is more complicated than zip codes (e.g. related to CPS schools) but are awaiting confirmation from our director of recruitment.

Q26.   How many users will need access to texting? Is CCC looking for each user to have their own unique number or can numbers be shared? A. 25-50

Q27.   In question 13.11, the document mentions the potential to have multiple portals for each constituent. Other than having a portal for applicants to access, what other portals is CCC looking to have with this initial solution?

A.   In addition to the application portal, CCC would like to explore a service portal for current students, e.g a place to make service requests, find forms, etc.

Q28.   Is CCC looking to have their phone system integrated into the solution or are they strictly looking to take notes based on phone calls?

A.   We would prefer to have our phones integrate into the CRM as it is difficult to have to run separate reports from the current CRM and Mitel Phone Solution. Ideally it would be essential to render results from one solution to improve operational efficiency.

Q29.   In regards to section 29, Historical Data
    1.   What data are you looking to import into the new system?
    2.   How many records are you looking to move into the new system?
    3.   Can you provide us a sample of the data you are looking to move into the new system?

   A. CCC will provide a more detailed answer at a later time but preliminarily CCC would like to import recent prospect and contact data.

Q30.   Will CCC have Peoplesoft resources to help with the integrations or will the vendor be responsible for all Peoplesoft customizations?

A.   Further discussion is requested for a better understanding of the question but generally CCC has internal PeopleSoft resources.

Q31.   After applying and acceptance to CCC (the Apply and Enroll) step, will new students need to be written to Peoplesoft?

A. CCC would like to work with the vendor to define the demarcation point between prospect student and current student but at some point students will need to be written back to PeopleSoft.

Q32.   What are the largest data set (or files) that will need to be ingested into the CRM? TBD

Q33.   How many integrations will be purely flat file integrations versus API-based? TBD

Q34.   How many integrations will need to be scheduled versus near-real time / real-time? TBD

Q35. Can we have a multi-vendor bid? Marketo will have to partner with another vendor largely for some of the CRM functionality, while we can handle nearly all of the email/marketing automation functionality required.

A. A response may include more than one vendor as long as the response delineates the capability / scope of each vendor

Q36. What is your overall contact database size? (for current students + prospective students)

A. It will be in the hundreds of thousands.

Q37. What is your monthly email volume?

A. Including internal communications, it will be in the millions

Q38. How many contacts do you send communications to on a regular basis?

A. Internal student population, stop outs, and prospects hundreds of thousands.

Q39. Will text messaging be used for 1:1 messaging, 1:many messaging, or both?

A. Both; however, please note that CCC is entering into an agreement with Signal Vine for 1:1 texting service, so we may need an integration in lieu of texts from the CRM initially.

Q40. Approximately how many email and text messages do you send or anticipate to send over the course of a year?

A. In the millions

Q41. Is there a need to control access or restrict data between marketing users and their associated departments/colleges for privacy or security reasons? Yes

Q42. How are Marketing emails send currently?

A. Through a combination of Outlook, MailChimp, and Pardot.

Q43. Which are Social applications with which integrations are required?

A. Facebook, Twitter, LinkedIn, Snapchat, YouTube, Instagram

Q44. Does your Room scheduling, Advising Appointment and Event Management application provides SOAP/REST APIs to interact with them and can they consume SOAP/REST APIs provided by other applications? (Ref14.1, 15)

A. We don't have an Event Management application
   1. Still confirming with Navigate but here is the link to the Ad Astra API library https://help.aais.com/Help/75/ad_astra_api.htm.

Q45. Provide some additional information on Phone Campaigns as to how it is managed currently and its flow? Does it involve and telephony solution?

A. Currently we do not have a telephony solution but manage outbound call campaigns either through our centralized call center working with our current CRM solution (which will be replaced by the

new solution) and/or by colleges' local outreach, currently tracked on spreadsheets or other one-off tools.

Q46.   How are Cases/Service Request managed currently?
A.   CCC has a partial solution for handling student complaints and IT requests through our current CRM vendor (which we would like to replace). Other issues are handled in an ad hoc fashion via email or online or PDF forms.

Q47.   Where do you currently store your prospective student data?
A.   PeopleSoft and external stand-alone databases or spreadsheets

Q48.   Are you open to integrated add-ons to accomplish some of the use cases?
A.   Yes. It is our assumption that add-ons will be necessary.

Q49.   Does CCC accept MBE/WBE certifications from outside of Illinois?
A.   We would need to see the certification documents. Please reference in Appendix 1, Section 5.1C.: Letters of Certification & Certification Determination.

Part II – Modifications to the RFP document

Item No. 1 – Legal Notice Advertisement – Change of RFP document name

From: Customer Relationship Management (CRM) System

TO: Constituent Relationship Management (CRM) System

Item No. 2 – Add the following language to the RFP in Section V – General Instructions

P.   Transparency Website; Trade Secrets
        Consistent with the CCC's practice of making available all information submitted in response to a public procurement, all proposals, any information and documentation contained therein, any additional information or documentation submitted to CCC as part this RFP, and any information or documentation presented to CCC as part of negotiation of a contract or other agreement may be made publicly available through the CCC's Internet website.

        However, Proposers may designate those portions of a Proposal which contain trade secrets or other proprietary data ("Data") which Proposer desires remain confidential.

        To designate portions of a RFP as confidential, Proposer must:

        i.   Mark the cover page as follows: "This proposal includes trade secrets or other proprietary data."

ii.   Mark each sheet or Data to be restricted with the following legend: "Confidential: Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this RFP."

iii.   Provide a USB with a redacted copy of the entire proposal or submission in .pdf format for posting on the CCC's website. Proposer is responsible for properly and adequately redacting any Data which Proposer desires remain confidential. If entire pages or sections are removed, they must be represented by a page indicating that the page or section has been redacted. Failure to provide a USB with a redacted copy may result in the posting of an un-redacted copy.

iv.   Provide a written explanation of the basis under which each redacted item has been deemed confidential, making reference to the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.).

Indiscriminate labeling of material as "Confidential" may be grounds for deeming a bid as nonresponsive.

All Proposals submitted to CCC are subject to the Freedom of Information Act. CCC will make the final determination as to whether information, even if marked "confidential," will be disclosed pursuant to a request under the Freedom of Information Act, valid subpoena, or other legal requirement. Proposer agrees not to pursue any cause of action against CCC with regard to disclosure of information.